

User Manual *wvRelationships for iMIS*

By:



191 N. Wacker Dr. #1400
Chicago, IL 60606
www.mcgladrey.com/imis

wvRelationships User Manual

Version 1.0

This manual is written for users to configure the *wvRelationships* module of *wvSuite*.

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Updates may be made to this documentation and incorporated into later editions.

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McGladrey LLP
191 N. Wacker Drive Suite 1400
Chicago, IL 60601



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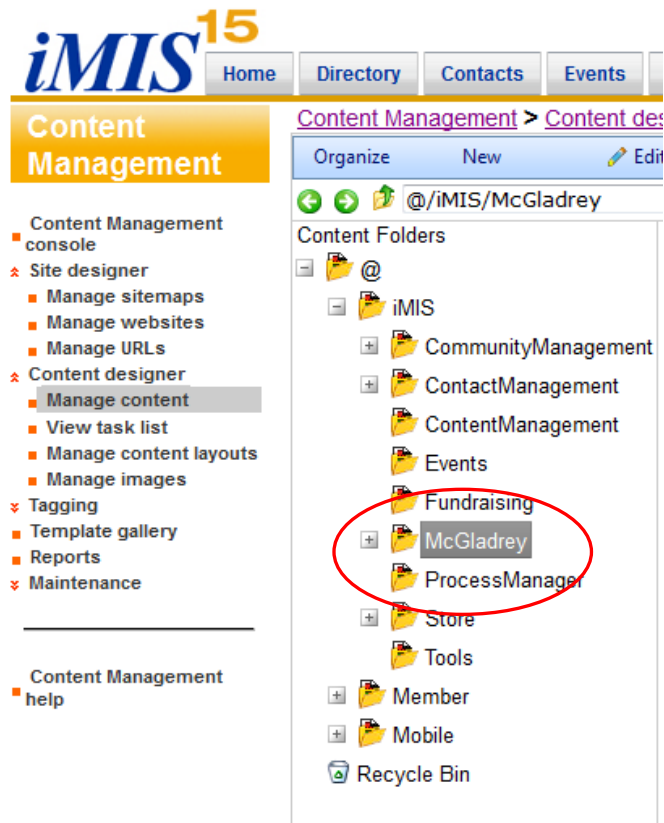
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wvRelationships - Configuration

The following are steps to configure the Relationship iPart. Installation of wvSuite is required before proceeding. If the installation of wvSuite has not yet been performed, instructions for the installation are found in the wvSuite Installation manual.

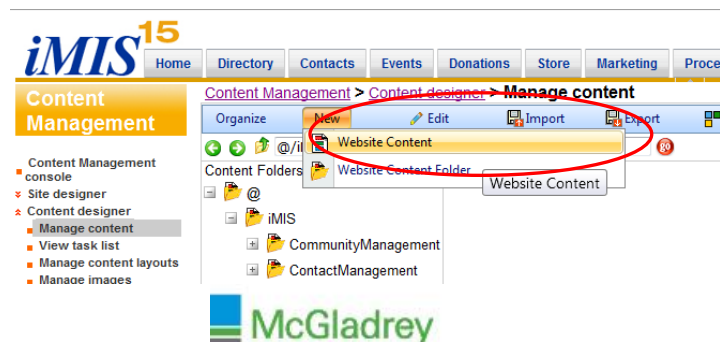
1. Create a place for the content

- Go to Content Management->ContentDesigner->Manage Content
- Create new folder called McGladrey under iMIS



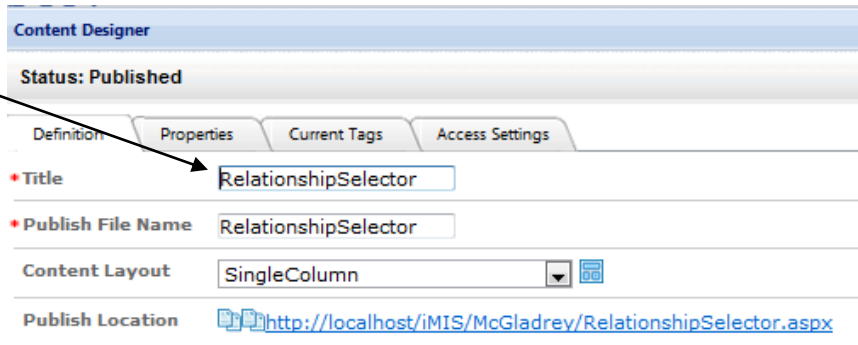
2. Create new content for the selection page of the activities

- Choose New
- Choose Website Content



- c. Title the new content RelationshipSelector

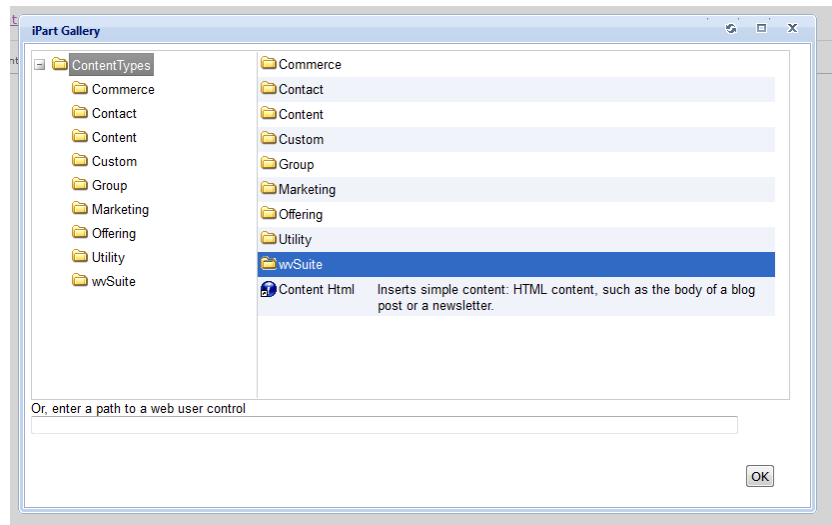
You can title this as you see fit. It will need to be referenced in Step6c



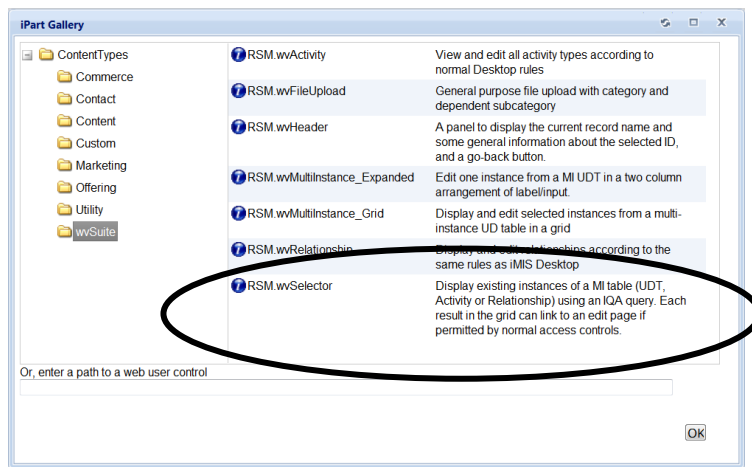
The image shows the 'Content Designer' interface with the 'Properties' tab selected. The 'Title' field is set to 'RelationshipSelector'. The 'Publish File Name' is also 'RelationshipSelector'. The 'Content Layout' is set to 'SingleColumn'. The 'Publish Location' is 'http://localhost/iMIS/McGladrey/RelationshipSelector.aspx'.

Field	Value
Title	RelationshipSelector
Publish File Name	RelationshipSelector
Content Layout	SingleColumn
Publish Location	http://localhost/iMIS/McGladrey/RelationshipSelector.aspx

- d. Click add content and select the wvSuite folder



- e. Choose the RSM.wvSelector in the wvSuite directory



3. Configure the RSM.wvSelector ipart

Configure iPart - RSM.wvSelector

*Name: RelationshipSelector

vwSelector configuration

This section

*Section title: RelationshipSelector

Instructions (HTML OK):

PageCode for this page (if child of another selector): (None)

Lock with parent page (if child of another selector):

Detail page

*Target URL for detail of found records: ~/iMIS/McGladrey/Relat

*Child Page Type: Relationships

Creating new items

Allow "Create New" Button: ☒

Allow user to choose selector value on "Create New": ☐

Create New button tooltip:

IQA Query

*IQA Query: \$/RSMCustomizations/iPselect
Note: if you modify the query definition, you must return here, save and publish.

IQA Query settings.

#	Display Name	Display Type	Value
1	iMIS Id Equals	Auto Assign	Selected iMIS ID

Filtering by column

Navigation by Column

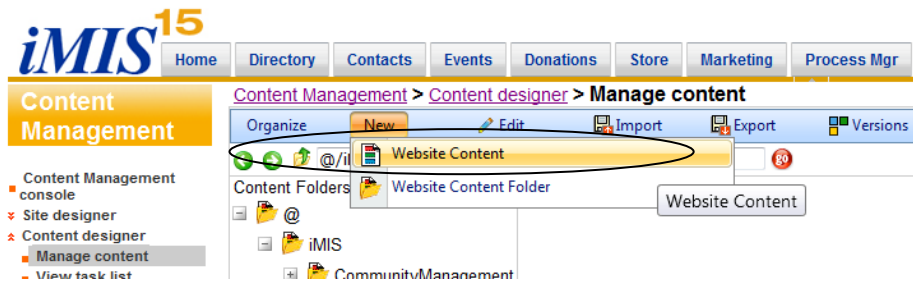
Formatting Options

vwSuite version 1.0.6575.1090, Flavor=Release;Build=20120702.184827;Rev=6575;
RSMSQLCLR version 1.0.6531.1000, Flavor=Release;Build=20120618.150619;Rev=6531;

Field Name:	Description	Value
Name	Unique Identifier of the part on the display page	RelationshipSelector
Section Title	Title on the page followed by selected name	Relationships for
Instructions	Instructions are displayed below the title. The instructions should give the user some information on how to use the feature or what is expected.	
PageCode for this page (if child of another selector):		(NONE)
Lock with parent page (if child of another selector):		Unselected
Target URL for detail of found records:	Page that will be navigated to upon select or create new	~/iMIS/McGladrey/RelationshipDetails.aspx
Child Page Type:	Type of Child page	Relationships
Allow "Create New" Button:	When checked, a new item can be created in the target page by the user.	Selected
Allow user to choose selector value on "Create New":	When checked, allows the user to define the selector value on the new item	Selected
Create New button tooltip:	Tooltip for create new button when hovering over it	
IQA Query:	Select the IQA created in Step 3	Click Select -> Select RelationshipSelector
IQA Query settings	These are the filters for the query. When this iPart is used in the web view of iMIS (staff view), iMIS ID Equals normally choose Auto Assign and Selected iMIS ID. For public views, use Auto Assign and Logged In iMIS ID	
Display Type	These are the filters for the query. When using iMIS ID, uses Selected ID	select Auto Assign
Value		Selected iMIS ID

4. Create the Relationship Detail page

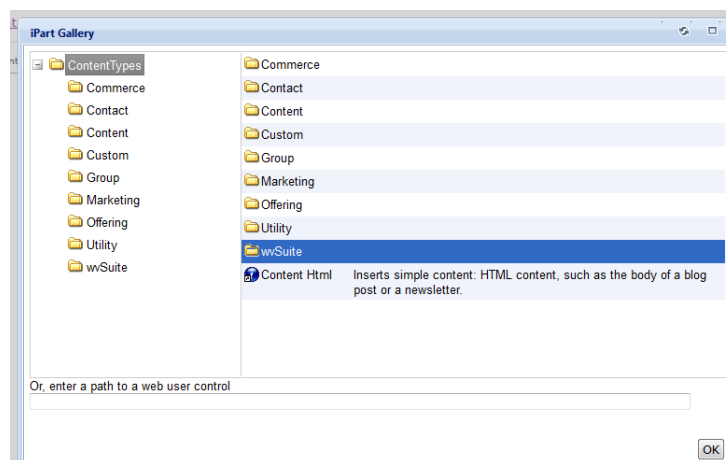
- a. Choose New
- b. Choose Website Content



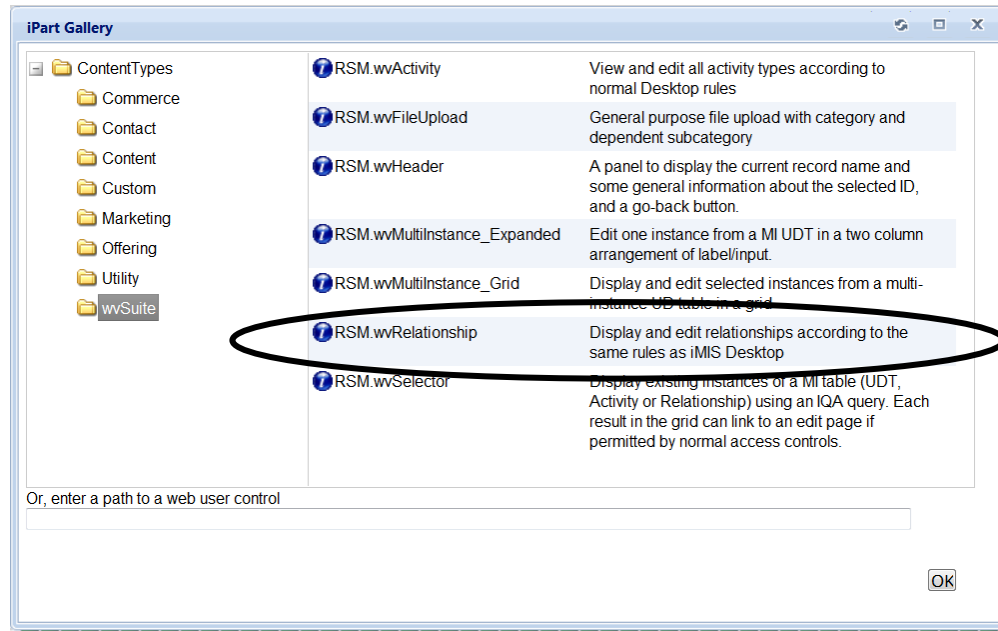
- c. Title the new content ActivityDetails

The screenshot shows the 'Content Designer' form. The status is 'Published'. The 'Title' field is set to 'RelationshipDetails'. The 'Publish File Name' field is also set to 'RelationshipDetails'. The 'Content Layout' is set to 'SingleColumn'. The 'Publish Location' is set to 'http://localhost/iMIS/McGladrey/RelationshipDetails.aspx'. The form has tabs for 'Definition', 'Properties', 'Current Tags', and 'Access Settings'.

- d. Click add content and select the wvSuite folder



- e. Choose the RSM.wvRelationship in the wvSuite directory



5. Configure RSM.wvRelationship

This can be selected if users are allowed to create a relationship without a target ID. These types of relationships are less useful for reporting, so many organizations teach their staff not to create them

Configure iPart - RSM.wvRelationship

* **Name**

wvRelationship configuration

*** Allow One Sided Relationships:**
☐

* **URL to Return To:**

* **Folder containing IQA queries for target ID:**

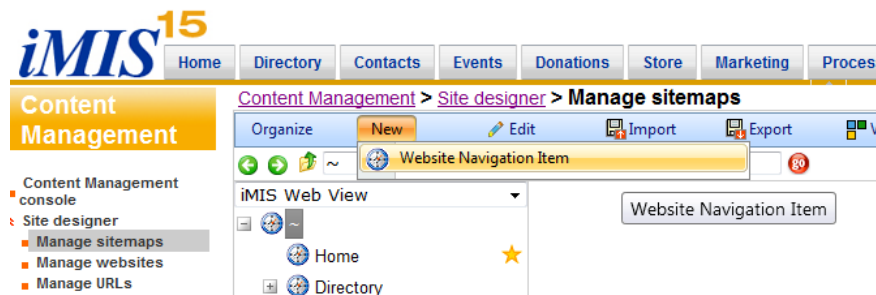
wvSuite version 1.0.6575.1090, Flavor=Release;Build=20120702.184827;Rev=6575;
 Common version 1.0.6528.1000, Flavor=Release;Build=20120618.121405;Rev=6528;

This property can be left blank, in which case it will use the global setting (See step 7)

Field Values:	Description	Value
Name	You can name this as you see fit	RelationshipDetail
URL to Return To:		~/iMIS/McGladrey/RelationshipSelector.aspx
Folder containing IQA queries for Target ID:	This is the directory location of the queries which are to be used for the selecting the ID of the records involved in the relationship.	

6. Add a navigation item for the Relationship selection information.

- Go to Site Designer-> Manage sitemaps
- Create the new website navigation item



Status: Published

Properties Workflow Management Options Access Settings

Navigation Link Text AddRelationship

Navigation Folder Name AddRelationship

Tool Tip Description

Content or URL to Link to @/iMIS/McGladrey/Relat [select](#) [i](#)

Or select a standard page: (None) [i](#)

URL Parameters

Breadcrumb Name AddRelationship [i](#)

☐ Hide on this page

Override Content Title [i](#)

Navigation Code [i](#)

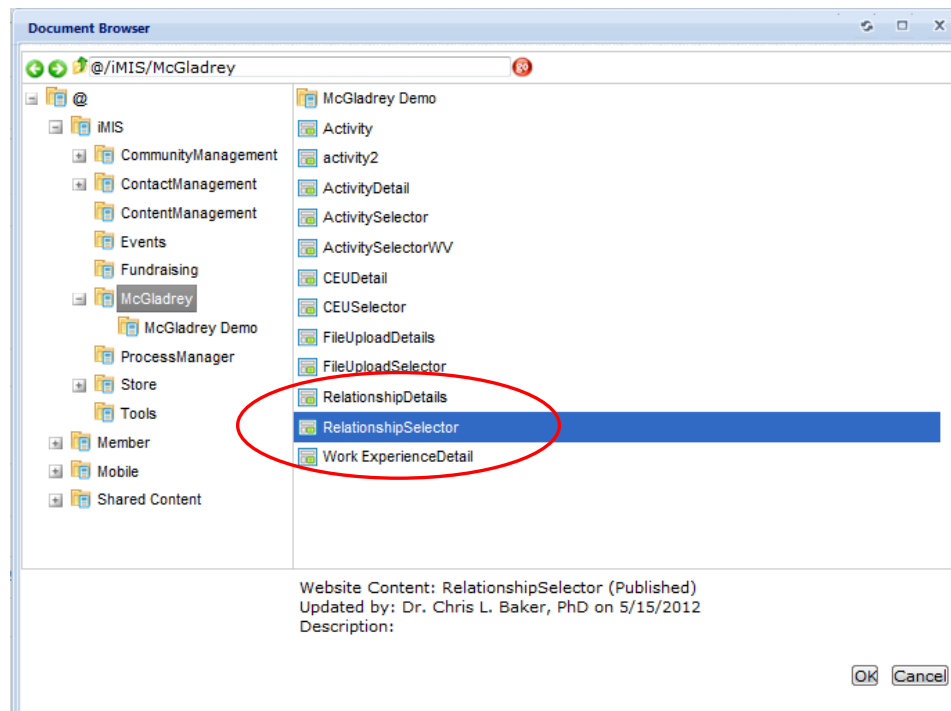
Image URL [select](#)

CSS Class

Folder containing template gallery content

☒ Inherit from parent

c. For Content or URL to Link to: Select -> RelationshipSelector



- d. **Move the navigation item to your chosen location by dragging and dropping to preferred location in left navigation area.**
- e. **Publish the navigation item.**

7. System Setup:

These settings can be found under System Setup->RSM Configuration

Default folder for FindID searches in wvMultiInstance and wvRelationship
(RSM.wvUtility.FindIDFolder)

\$/ContactManagement/DefaultSystem/Queries/Contacts



Example of finished wvRelationship:

Selector page:

iMIS¹⁵ Home Directory **Contacts** Events Donations Store Marketing Process Mgr Communities System Setup Tools Content Management

Search Go [Advanced Search](#) | [Help](#)

Contacts [Contacts > AddRelationship](#)

RelationshipSelector Carol Hamilton, Foundation Support Systems

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
MB	195	ALLEN, CHOCO		M				
RM	204	RAMADAS, DAS		MB				
SALES	122	GOODENZ, JANE	Spybreakers Ltd.	PROSPECT				

- Find contact
- Create account
- Contact management
- Register for event
- Make a purchase

- Contacts help
- Member Profile
- Activity Selector
- FileUpload
- AddRelationship**
- Upload Documents
- Work Experience
- My CEUs

Detail Page:

iMIS¹⁵ Home Directory **Contacts** Events Donations Store Marketing

Contacts [Contacts > AddRelationship](#)

Relationship Detail

Target **Jane Goodenz, Spybreakers Ltd.**

* Relationship Prospect

* Reciprocal Contract
Contractor To
daughter of

Title father of

Functional Title Gift Buyer
Institution Served By

From Knows
Managed

Thru Managed By
Member

Group Code mother of
Member Relations Rep
Member Relations Rep To
Novelty Buyer

Note officer of
Primary Institution Served
Practices At
parent of
Practitioner

Date Added 9/12/2005 Last Updated (none) By MANAGER

wvRelationship– Create New Relationship

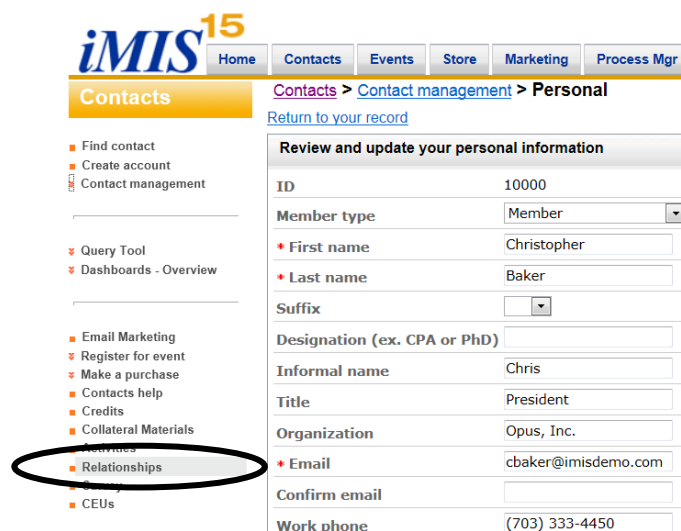
The following are steps to create a new relationship using the wvRelationship iPart.

1. Choose record on which the relationship is to originate.
 - a. From Contacts tab (or tab labeled for your records), choose Find contact.



The screenshot shows the iMIS 15 interface. The top navigation bar includes Home, Contacts, Events, Store, Marketing, and Process M. The left sidebar has a 'Contacts' section with options: Find contact (selected), Create account, Contact management, Query Tool, and Dashboards - Overview. The main content area is titled 'Contacts > Find contact'. It features a 'Source' section with a 'Select a Query' dropdown set to 'Queries'. Below this are input fields for 'Last name starts with', 'First name starts with', 'Company contains', and 'ID equals'. A 'Find' button is at the bottom of these fields. A message at the bottom says 'Please enter your search criteria to view results'.

- b. Proceed normally to obtain desired record. (See standard iMIS documentation on how to retrieve a record.)
2. Choose the wvRelationship link from the navigation. (In this example, it is called Relationships. Your website may have a slightly different link name and be in a different position on the navigation.)



The screenshot shows the iMIS 15 interface. The top navigation bar includes Home, Contacts, Events, Store, Marketing, and Process Mgr. The left sidebar has a 'Contacts' section with options: Find contact, Create account, Contact management, Query Tool, and Dashboards - Overview. The main content area is titled 'Contacts > Contact management > Personal'. It features a 'Review and update your personal information' section with a table of fields: ID (10000), Member type (Member), First name (Christopher), Last name (Baker), Suffix, Designation (ex. CPA or PhD), Informal name (Chris), Title (President), Organization (Opus, Inc.), Email (cbaker@imisdemo.com), Confirm email, and Work phone ((703) 333-4450). The 'Relationships' link in the left sidebar is circled.

3. Click Create New button to create a new relationship.

[Contacts](#) > **Relationships**

Relationships for Christopher Baker, Opus, Inc.


 Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
CHILD	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
KEY	193		Opus, Inc.	KEY				
KNOWS	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
KNOWS	10049	CASSIDY, SEYMOUR		KNOWS				
PARENT	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
RB	121	BONDLUM, JAMES	Spybreakers Ltd.	BOD				

4. A blank relationship screen now appears. Click on the magnifying glass to obtain the correct record for the relationship.

[Contacts](#) > **Relationships**

Relationship Detail

Target 

*Relationship

*Reciprocal

Group Code

Note

Date Added Last Updated By

5. Find a record using the queries available in the drop down list. Fill out the query's parameters and click the Find button to retrieve the desired record.

[Records](#) > [Record management](#) > **Relationships**

Relationships for Donald McDonald Home Chapter of Chiarente 8 N

Search Types

*iMIS ID equals

Results

by ID

by ID

by Last Name

by Name

by RMHC Region

by State_Province

for all records in a specific city

for Individuals in My Chapter

for My Chapter

for My Programs and Related Organizations

for non RMHC Organization or Company

for non-Chapter Individuals

Orgs, Programs and Other Types of Companies (No Individuals)

Ok

Cancel

Date Added **Last Updated** **By**

Save

Cancel

Delete

[Records](#) > [Record management](#) > **Relationships**

Country:
(Any)

State/Province:
(US and Canada only)
Indiana

Region
(Any)

Record Type:
(Any)

Find

Results

15853 - Parkview Hospital 2200 Randallia Dr. Fort Wayne, Indiana 46805

Ok

Cancel

6. Highlight the correct record in the Results area and click OK.

[Records](#) > [Record management](#) > **Relationships**

Country:
(Any)

State/Province:
(US and Canada only)
Indiana

Region
(Any)

Record Type:
(Any)

Results
15853 - Parkview Hospital 2200 Randallia Dr. Fort Wayne, Indiana 46805 U

7. Choose relationship type from drop down list of relationships.

iMIS¹⁵ [Home](#) [Directory](#) [Contacts](#) [Events](#) [Donations](#) [Store](#) [Marketing](#)

Contacts [Contacts](#) > **AddRelationship**

Relationship Detail

Target

*Relationship

*Reciprocal

Title

Functional Title

From

Thru

Group Code

Note

Date Added 9/12/2005 Last Updated (none) By MANAGER

8. Populate fields as appropriate. Click Save to keep the new relationship. Click cancel to discard.

wvRelationship – Edit Relationship

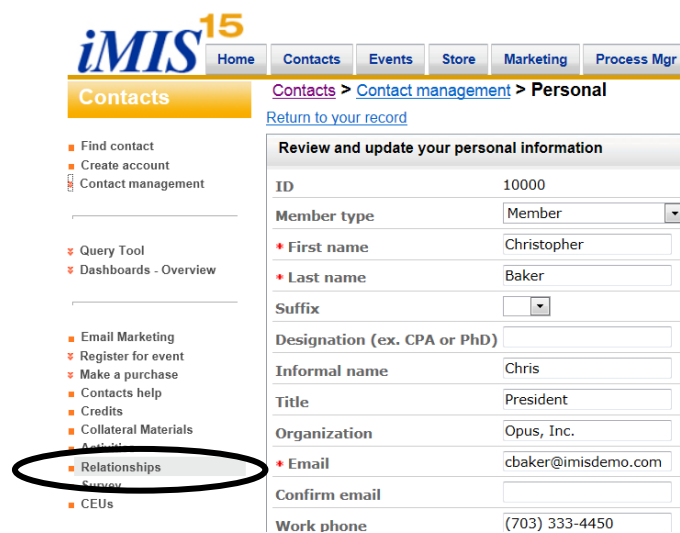
The following are steps to edit an existing relationship using the wvRelationship iPart.

1. Choose record on which the relationship resides.
 - a. From Contacts tab (or tab labeled for your records), choose Find contact.



The screenshot shows the iMIS 15 interface. The top navigation bar includes Home, Contacts, Events, Store, Marketing, and Process M. The left sidebar has a 'Contacts' section with options: Find contact, Create account, Contact management, Query Tool, and Dashboards - Overview. The main content area is titled 'Contacts > Find contact'. It features a 'Source' section with a 'Select a Query' dropdown set to 'Queries'. Below this are input fields for 'Last name starts with', 'First name starts with', 'Company contains', and 'ID equals'. A 'Find' button is at the bottom right of the search criteria. A message at the bottom says 'Please enter your search criteria to view results'.

- b. Proceed normally to obtain desired record. (See standard iMIS documentation on how to retrieve a record.)
2. Choose the wvRelationship link from the navigation. (In this example, it is called Relationships. Your website may have a slightly different link name and be in a different position on the navigation.)



The screenshot shows the iMIS 15 interface. The top navigation bar includes Home, Contacts, Events, Store, Marketing, and Process Mgr. The left sidebar has a 'Contacts' section with options: Find contact, Create account, Contact management, Query Tool, and Dashboards - Overview. The main content area is titled 'Contacts > Contact management > Personal'. It features a 'Review and update your personal information' section with a table of fields: ID (10000), Member type (Member), First name (Christopher), Last name (Baker), Suffix, Designation (ex. CPA or PhD), Informal name (Chris), Title (President), Organization (Opus, Inc.), Email (cbaker@imisdemo.com), Confirm email, and Work phone ((703) 333-4450). The 'Relationships' link in the left sidebar is circled.

- Find the relationship you wish to edit from the list of previously created relationships. To assist in finding the relationship, the list can be sorted by any column. Click on the Column Title link to sort. Click on the same link again to sort in the opposite order.

[Contacts](#) > **Relationships**

Relationships for Christopher Baker, Opus, Inc.

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
CHILD	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
KEY	193		Opus, Inc.	KEY				
KNOWS	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
KNOWS	10049	CASSIDY, SEYMOUR		KNOWS				
PARENT	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
RB	121	BOND LUM, JAMES	Spybreakers Ltd.	BOD				

- Click the link in the Type column of the relationship to edit.

[Contacts](#) > **Relationships**







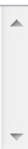
Relationships for Christopher Baker, Opus, Inc.

Create New

Type	Target ID	Name	Company	Target Type	Status	Title	Eff Date	Thru Date
CHILD	133	ELLIS, ELLEN	Society of Over Achievers	PARENT				
KEY	193		Opus, Inc.	KEY				
KNOWS	10023	KENNEDY, TOM	U.S. Senate	KNOWS				
KNOWS	10049	CASSIDY, SEYMOUR		KNOWS				
PARENT	152	FARMHAVEN, MARCIE	Prodigy Makers International	DAUGHTER				
RB	121	BOND LUM, JAMES	Spybreakers Ltd.	BOD				

5. Make review or make changes to the relationship selected. Click OK to save; Cancel to not save changes; Delete to remove the relationship. (The delete function follows the setting in iMIS Desktop.)

Contacts > Relationships

Relationship Detail	
Target	Seymour Cassidy 
*Relationship	Knows 
*Reciprocal	Knows 
Title	
Functional Title	
Group Code	
Note	Friends from college. Were in same fraternity. 
Date Added 9/10/2002 Last Updated (none) By JOY	
<div>Save Cancel Delete</div>	